

**Site Visit Review Form**

*Setting*

Name:	ID:	County:
Street Address:	City/Zip:	Phone:
Bureau of Children and Adult Licensing (BCAL) Number:	NPI:	EIN:

*Contact Person*

Name:	Phone:
Title	Email:

*MDHHS Setting Identification Elements of Concern*

Issue Tier(s):	Issue Description(s):

*Communications*

Setting Decision Date:	Participate?	YES	NO
Joint Notification Letter Date:	Phone Call:		
MSU Scheduling Letter Date:	Phone Call:		
Site Visit Date:	Phone Call:		
Summary Date:	Phone Call:		

**PART A: MDHHS(?) Pre-Visit Document Review**

**Review of survey data provider and Individual**

Document	Evidence	Findings	Impression (Met/Not Met)	Comments
1				
2				
3				
4				
5				

**PART B: On-Site Visit Review**

Setting Issue 2	Setting appears to have the effect of isolating individuals receiving home and community-based services (HCBS) from the broader community of individuals not receiving HCBS (ref STC, v3.1, p. 122)			
Evidence Must Demonstrate	The setting does not isolate participants from the broader community of individuals not receiving HCBS (ref STC, v3.1, p. 122)			
Characteristic to Demonstrate (ref STC, v3.1, p. 122)	Information Source(s)	Sample Supporting Documentation	Impression (Met/Not Met)	Comments/Rationale for Decision
<p>1 The setting is integrated in the community to the extent that a person or persons without disabilities in the same community would consider it a part of their community and would not associate the setting with the provision of services to persons with disabilities</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Interview (please specify)                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Individual</li> <li><input type="checkbox"/> Family/Advocate</li> <li><input type="checkbox"/> Staff</li> <li><input type="checkbox"/> Other (ie Outside Agency, Service Provider)</li> </ul> </li> <li><input type="checkbox"/> Observation</li> <li><input type="checkbox"/> Record/Document review</li> <li><input type="checkbox"/> Rights Modification</li> <li><input type="checkbox"/> Other (describe)</li> <li><input type="checkbox"/> N/A</li> </ul>	<p><i>Resident agreement or pamphlets; publicized community resources; visitor P&amp;P (hours and/or restrictions); consideration of breadth of services provided "in-house"; lease/written residency agreement available for HCBS (non-licensed settings must have lease); R/R about housing and relocation;</i></p> <p><i>visitor/guest P&amp;P</i></p> <p><i>ex. posted activity schedules/calendars; publicized public transportation options; diversity of residents; availability of setting own schedule; no doors with restricted access (gate card, key pad) – to building and individual unit; individual units with locking door;</i></p>		

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Characteristic to Demonstrate (ref STC, v3.1, p. 122)	Information Source(s)	Sample Supporting Documentation	Impression (Met/Not Met)	Comments/Rationale for Decision
		<i>staff request access to private space (doorbell, knock); staff interview; resident interview;</i>		
2 The individual participates regularly in typical community life activities outside of the setting to the extent the individual desires. Such activities do not include only those organized by the provider agency specifically for a group of individuals with disabilities and/or involving only paid staff; community activities should foster relationships with community members unaffiliated with the setting	<input type="checkbox"/> Interview (please specify) <ul style="list-style-type: none"> <li><input type="checkbox"/> Individual</li> <li><input type="checkbox"/> Family/Advocate</li> <li><input type="checkbox"/> Staff</li> <li><input type="checkbox"/> Other (ie Outside Agency, Service Provider)</li> </ul> <input type="checkbox"/> Observation <input type="checkbox"/> Record/Document review <input type="checkbox"/> Rights Modification <input type="checkbox"/> Other (describe) <input type="checkbox"/> N/A	<i>Resident agreement or pamphlets; publicized community resources; visitor P&amp;P (hours and/or restrictions); consideration of breadth of services provided "in-house"; any limitations documented in personal care plan or "resident council";</i>  <i>consideration of breadth of services provided "in-house"; able to receive services outside of setting; posted activity schedules/calendars; publicized public transportation options; diversity of residents; absence of time restrictions</i>		

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		<p><i>to come/leave as desired; any limitations documented in personal care plan or "resident council"; availability of setting own schedule; availability to schedule own meals/snacks; availability to select own clothing; ability to use personal communication devices privately; freedom to decorate own space; cameras/monitors only in response to documented need; choice of roommate available; access to common areas without restrictions/timing; setting accessible; no need for residents to sign-in/sign-out; visitor/guest P&amp;P; personal care plan documentation; staff interview; resident interview;</i></p>		

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3 Services to the individual, and activities in which the individual participates, are engaged with the broader community	<input type="checkbox"/> Interview (please specify) <ul style="list-style-type: none"> <li><input type="checkbox"/> Individual</li> <li><input type="checkbox"/> Family/Advocate</li> <li><input type="checkbox"/> Staff</li> <li><input type="checkbox"/> Other (ie Outside Agency, Service Provider)</li> </ul> <input type="checkbox"/> Observation <input type="checkbox"/> Record/Document review <input type="checkbox"/> Rights Modification <input type="checkbox"/> Other (describe) <input type="checkbox"/> N/A	<p><i>Resident agreement or pamphlets; publicized community resources; visitor P&amp;P (hours and/or restrictions); consideration of breadth of services provided “in-house”; able to receive services outside of setting; visitor/guest P&amp;P;</i></p> <p><i>Ex. consideration of breadth of services provided “in-house”; able to receive services outside of setting; posted activity schedules/calendars; publicized public transportation options; diversity of residents and visitors; any limitations documented in personal care plan or “resident council”; availability of setting own schedule; no need for residents to sign-in/sign-out; personal care plan documentation; staff</i></p>		

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		<i>interview; resident interview</i>		